

I claim:

1. A method for managing contact information, comprising the following steps:
entering customer information into a database;
5 placing individual customers in workflow stations;
contacting customer within a specified schedule for introducing product information; and
processing customer information and feedback and moving said customer to a subsequent
workflow station based upon said feedback.
- 10 2. The method of claim 1, wherein said product information is manually entered into said
database.
- 15 3. The method of claim 1, wherein said product information is imported into said database
in a data transfer.
4. The method of claim 3, wherein said data transfer is an electronic transfer of data through
a communication link of multiple computers.
- 20 5. The method of claim 1, wherein said customer is a marketing Lead.
6. The method of claim 4, wherein entering customer information further comprising the
step of indicating source origination of the customer.
- 25 7. The method of claim 6, wherein said source origination for said customer is
determinative of initial station location.
8. The method of claim 1, further comprising the step of sending a communication to a
station supervisor upon failing to contact customer within defined station duration.

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9. The method of claim 8, wherein said communication is in the form of an electronic mail message.
10. The method of claim 1, further comprising the step of generating a reports on progression of individual customers through said workflow.
11. The method of claim 10, further comprising forwarding said report to a supervisor through an electronic mail message.
12. The method of claim 11, further comprising attaching said report as a hyper text mark-up language in said electronic mail message.
13. The method of claim 10, further comprising the step of establishing an automated periodic generation of reports of customer progression at established time intervals.
14. The method of claim 10, wherein said report is customized by an authorized user from a plurality of database fields.
15. The method of claim 14, wherein said fields are selected from the group consisting of all sources, specific sources, all stations, specific stations, aging of customers in said database, dates, geographical data, and combinations thereof.
16. The method of claim 14, wherein said report is presented to an authorized user in a graphical format.
17. A workflow management system for tracking sales and marketing customers, comprising: entering customer information into a database; placing each customer in an initial station based upon source of said customer;

initiating contact with said customer and introducing product information within a specified duration;

moving said contact to a subsequent station following initial contact based upon reaction of said contact;

5 generating an alert if said customer remains in a station beyond a predefined duration; and

managing said contact through a plurality of stations to ensure proper introduction of product information within predefined durations for each of said stations.

10 18. The system of claim 17, wherein said customer originates from a purchased list.

19. The system of claim 18, wherein said customer enters said database in station one.

20. The system of claim 19, wherein an alert is generated if said customer remains in said initial station in excess of thirty days.

21. The system of claim 20, wherein a subsequent station is selected from the group consisting of station four, station five, station six, station seven and station eight.

20 22. The system of claim 17, wherein said customer originates from a commercial event.

23. The system of claim 22, wherein said customer enters said database in station two.

24. The system of claim 23, wherein an alert is generated if said customer remains in said initial station in excess of seven days.

25 25. The system of claim 24, wherein a subsequent station is selected from the group consisting of station four, station five, station six, station seven and station eight.

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25. The system of claim 17, wherein said customer enters said database from personal contact.
26. The system of claim 25, wherein said customer enters said database in station three.
27. The system of claim 26, wherein an alert is generated if said customer remains in said initial station in excess of two days.
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28. The system of claim 27, wherein a subsequent station is selected from the group consisting of station four, station five, station six, station seven and station eight.
29. The system of claim 17, wherein contact with customer in an originating station was attempted without establishing actual customer contact.
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30. The system of claim 29, wherein said customer is transferred to station four.
31. The system of claim 30, wherein an alert is generated if said customer remains in said station in excess of ninety days without establishment of contact from marketing personnel.
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32. The system of claim 31, wherein a subsequent station is selected from the group consisting of station five, station six, station seven and station eight.
33. The system of claim 17, wherein contact with said customer was established at said originating station and said customer requires further qualification of product.
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34. The system of claim 33, wherein said customer is transferred to station five.

35. The system of claim 34, wherein an alert is generated if said customer remains in said station in excess of thirty days without establishment of contact from marketing personnel.

5 36. The system of claim 34, wherein a subsequent station is selected from the group consisting of station six, station seven, station eight, station nine, station ten, station eleven, station twelve and station thirteen.

10 37. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer is moderately interested in said product.

15 38. The system of claim 37, wherein said customer is transferred to station six.

20 39. The system of claim 37, wherein said contact is contacted at least one time within a thirty day period.

25 40. The system of claim 38, wherein a subsequent station is selected from the group consisting of station seven, station eight, station nine, station ten, station eleven, station twelve and station thirteen.

30 41. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer may be influenced to purchase said product.

35 42. The system of claim 41, wherein said customer is transferred to station seven.

40 43. The system of claim 42, wherein said contact is contacted at least one time within a one

hundred twenty day period.

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44. The system of claim 43, wherein a subsequent station is selected from the group consisting of station eight, station nine, station ten, station eleven, station twelve and station thirteen.
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45. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer is interested in said product
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46. The system of claim 45, wherein said customer is transferred to station nine.
47. The system of claim 45, wherein said contact is transferred to a sales representative,
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48. The system of claim 46, wherein a subsequent station is selected from the group consisting of station ten, station eleven, station twelve and station thirteen.
49. The system of claim 17, wherein said customer was transferred to a sales representative and subsequently rejected by said sales representative.
50. The system of claim 49, wherein said contact is transferred to a marketing representative.
51. The system of claim 50, wherein a subsequent station is selected from the group consisting of station eleven, station twelve and station thirteen.
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52. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said customer is not interested in said product and remains in said workflow.

53. The system of claim 52, wherein said contact is transferred to station eleven.
54. The system of claim 53, wherein said contact must receive communication from a marketing representative within thirty days of arriving in said station prior to generation of an alert to a station master.
55. The system of claim 54, wherein a subsequent station is selected from the group consisting of station twelve and station thirteen.
56. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said contact is a customer.
57. The system of claim 56, wherein said customer remains in the database for subsequent marketing campaigns.
58. The system of claim 17, wherein contact with said customer was established at said originating station and transferred from a subsequent station and said contact is not interested in product information.
59. The system of claim 58, wherein said customer is removed from the database for any subsequent marketing campaigns.
60. A computer readable medium having computer executable instructions stored thereon for performing the following steps:
entering a plurality of records into a relational database;
entering records of said database into a workflow management system for monitoring and managing Leads defining said records through a predefined cycle;

acting on said Leads within predefined intervals; and
moving said Leads within said workflow based upon actions on said records and
reactions of said records.

- 5 61. The computer readable medium of claim 60, further comprising generating tardiness
messages to managers of the workflow management system for all records indicating lack
of communication from a defined user.
- 10 62. The computer readable medium of claim 61, further comprising generating reports for
analyzing progress of records through said workflow.
- 15 63. The computer readable medium of claim 62, wherein said reports are automatically
generated at predefined intervals.
64. The computer readable medium of claim 62, wherein said reports are custom defined
based upon user selected fields of the database.
- 20 65. The compute readable medium of claim 60, wherein said database providing support for
import of records from external sources.
66. The computer readable medium of claim 60, wherein said database further providing
support for exporting database records into mailing lists.
- 25 67. The computer readable medium of claim 65, further comprising providing for automatic
validation of import data information.
68. The computer readable medium of claim 67, further comprising providing fo automatic
removal of duplicate data information.

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69. The computer readable medium of claim 60, further comprising providing for managing of an individual Lead through said workflow in independent cycles.
70. The computer readable medium of claim 60, further comprising providing for custom defining workflow rules.
71. The computer readable medium of claim 60, further comprising a personal calendar for reminding users of the database of tasks to be performed on select records.
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